

Community Conversations for Fauquier County

Stepping Stones to our Future



First Community Conversations Meeting

May 17th, 2016

what's this
about?



Fauquier County

our
future.

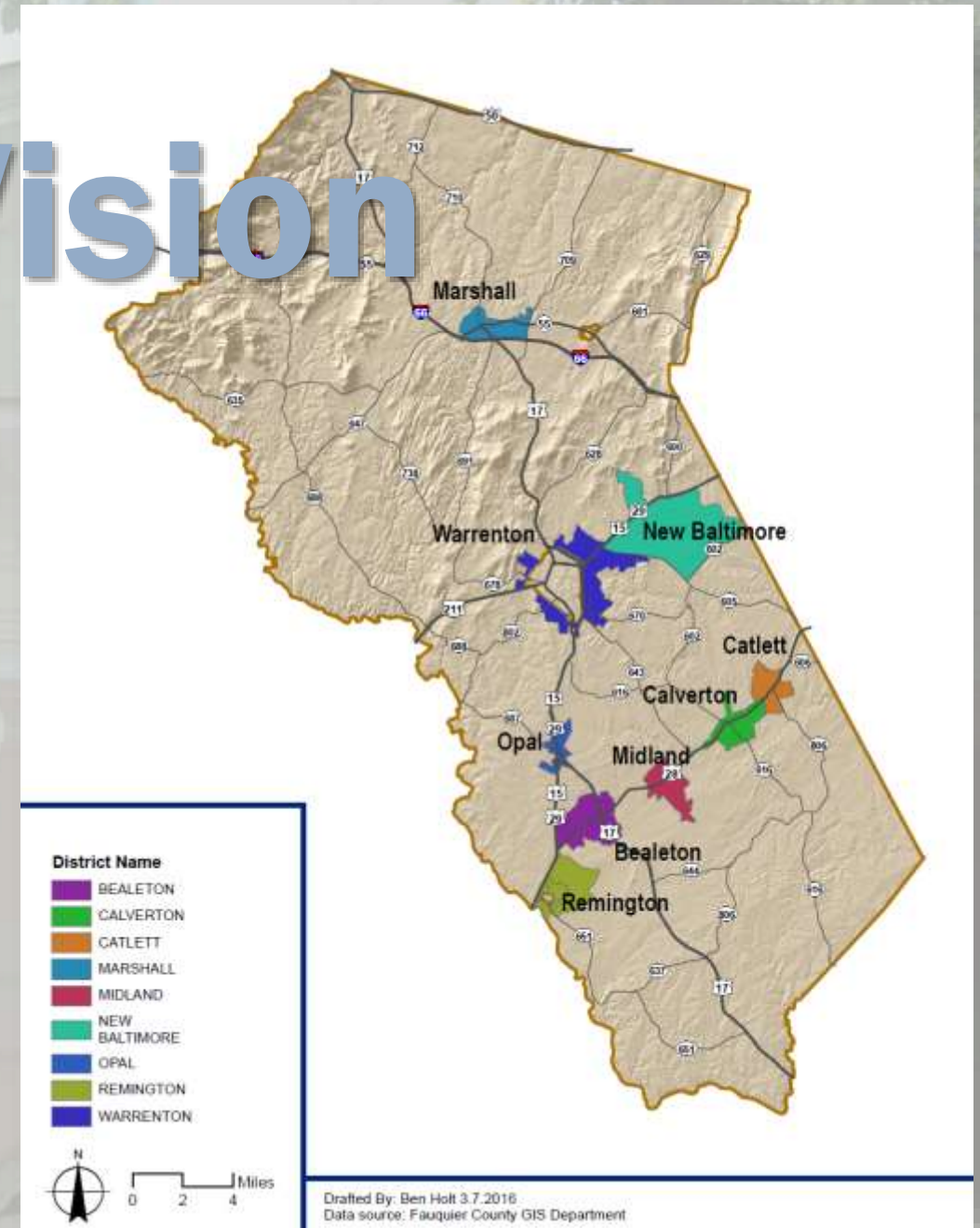
why these conversations?



keeping in mind:

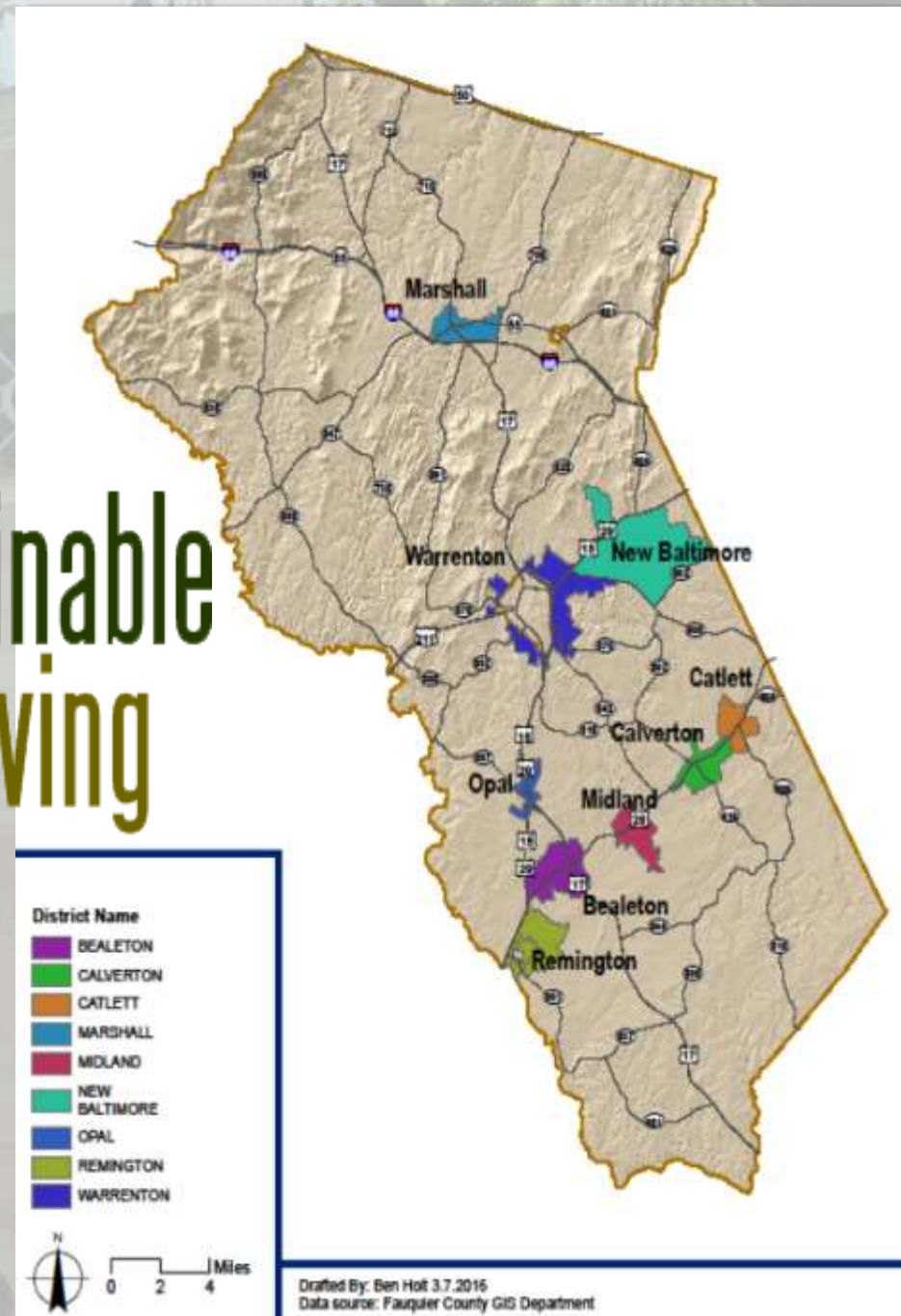
The County's Vision

"Fauquier County is a thriving community that honors its natural and cultural resources, agricultural heritage and rural landscape while building a sustainable economy and promoting outstanding services and growth within defined service districts."



The County's Vision

economy
rural service
districts
agriculture
community
Fauquier
growth resources
sustainable
thriving



The basics on the project:



This Plan:

IS:

**A Community
Process**

**Reaffirming &
Refreshing our 50-
year Vision**

An Action Plan

is NOT:

**A Comprehensive
Plan**

A Vision

**Something to
sit on a shelf**

Schedule



So:
where are we today?



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where are we headed
tomorrow?



PAST:

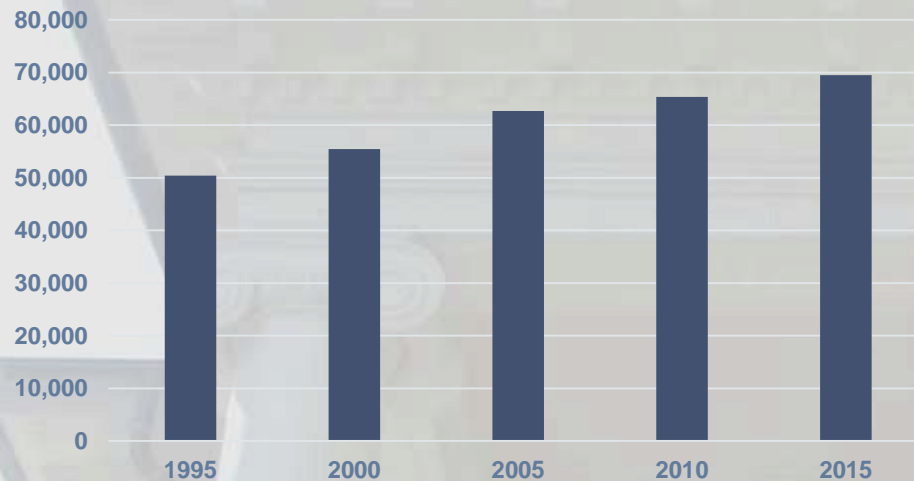
Fauquier
County has
added

955

people per year

In the past 20 years

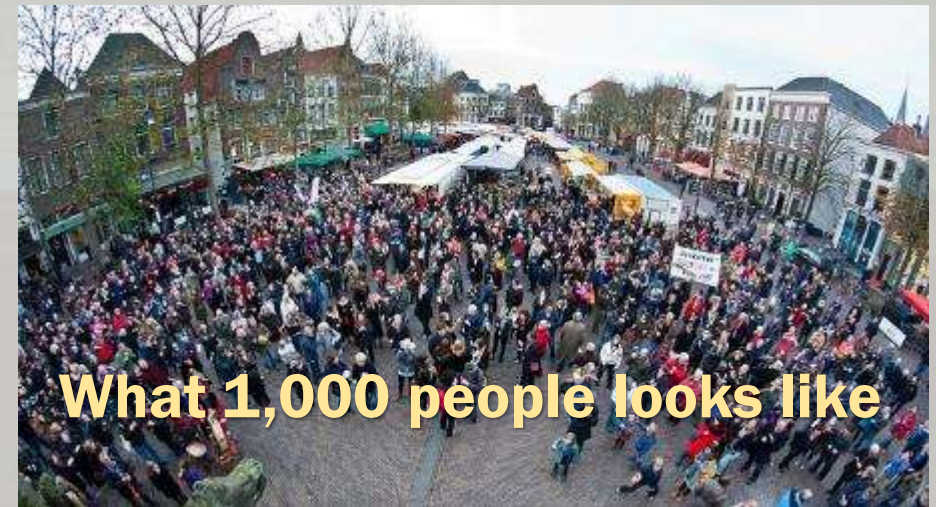
Total Population



Source: Woods & Poole Economics

2015
population: **69,521**

Source: Woods & Poole Economics



What 1,000 people looks like

Source: Flickr.com

38 %increase
since 1995

FUTURE?

Fauquier County
is PROJECTED to
add as much as

1,813

people per year

In the **next** 20 years

Source: Woods & Poole Economics



More than adding the
population of Marshall
every year?



estimated 2035
population: **106,000**

Source: Woods & Poole Economics

estimated 2040
population: **93,028**

Source: Weldon Cooper Center

NOTE THAT FORECASTS DIFFER! (Forecasting is an inexact science!)

A word about population projections

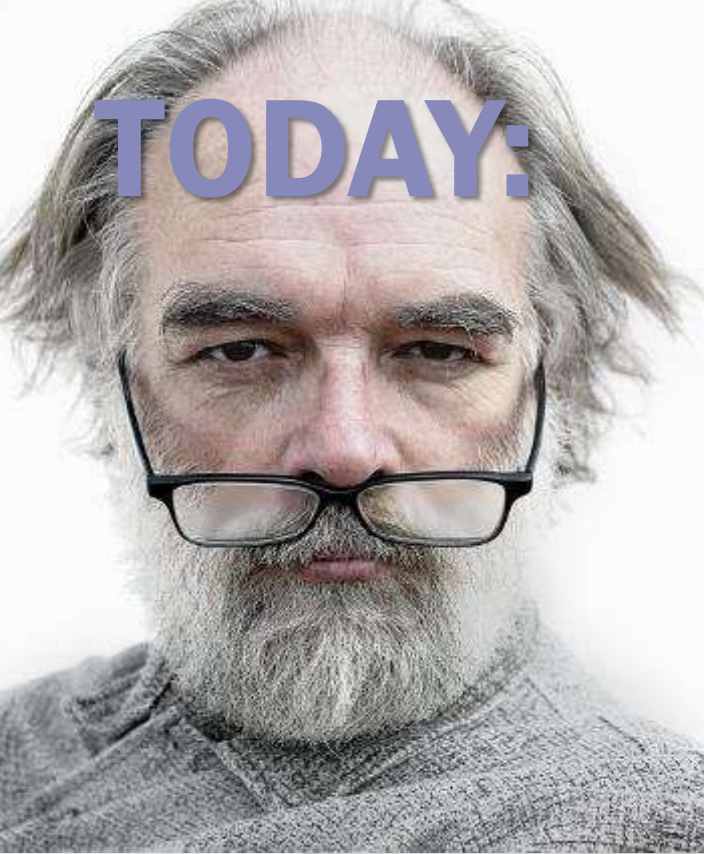


Most accurate → **National**
POPULATION PROJECTIONS **State**

Least accurate → **County**

Most predictable → **Birth/death rates**
POPULATION PROJECTIONS

Least predictable → **Migration rates**



TODAY:

Fauquier County is

older

**than the rest of
Virginia**

**Larger share
of seniors
(65+ years
old)**

**BUT - Boomers have
become the age
group with the most
entrepreneurs in
America!**

**Fauquier County's median
age has increased
significantly since 2000,
from 37.8 years to 42.5
years**

Source: 2000 Census, ESRI Business Analyst 2015 estimates

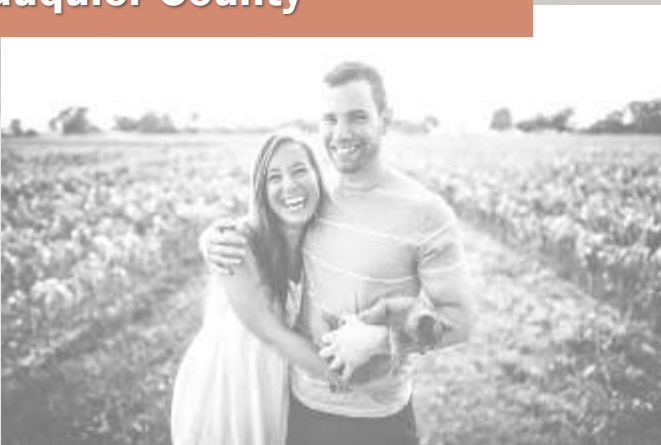
**Smaller share of 25-34 year
olds (the Millennial
generation)**



more
married couples
than the rest of Virginia

50%
Virginia

60%
Fauquier County

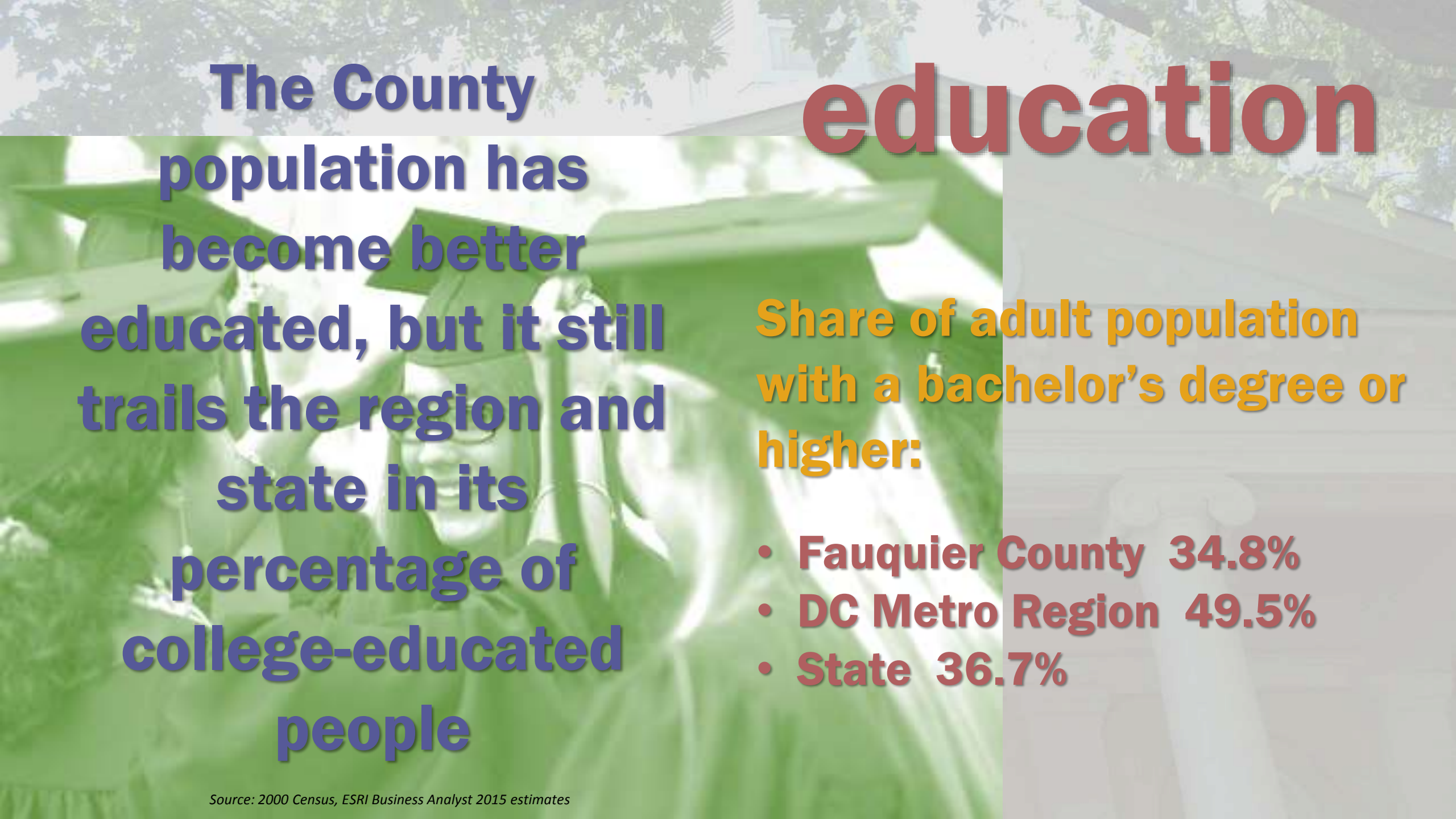


more
home ownership
than the rest of Virginia

65%
Virginia

76%
Fauquier County



The background of the slide features a photograph of several graduates in white academic regalia, including caps and gowns, celebrating their achievement. They are holding their caps high in the air. The image is partially obscured by text overlays.

**The County
population has
become better
educated, but it still
trails the region and
state in its
percentage of
college-educated
people**

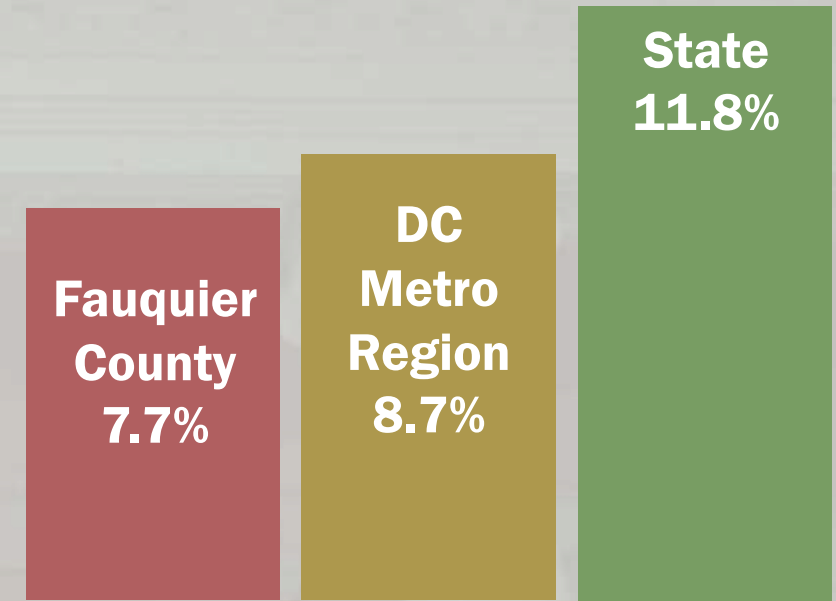
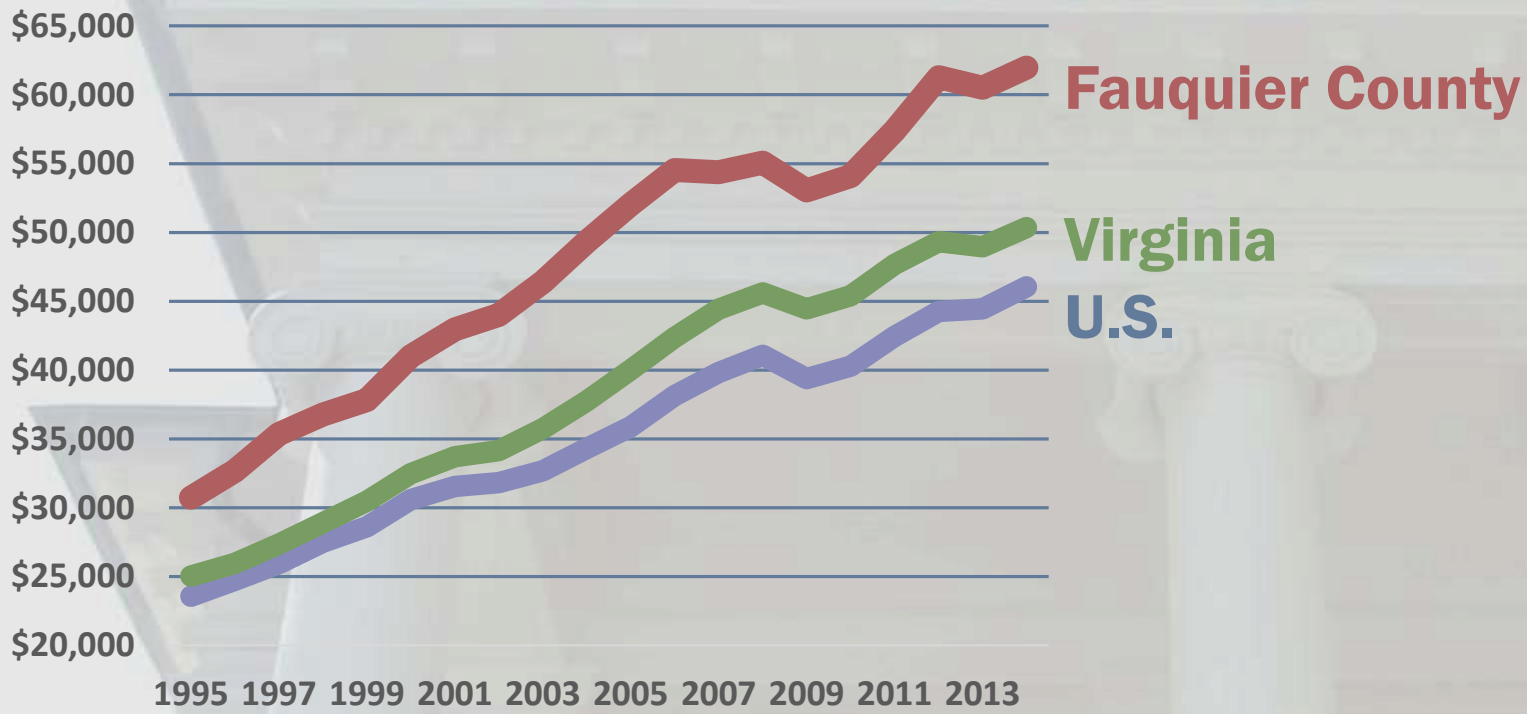
education

**Share of adult population
with a bachelor's degree or
higher:**

- **Fauquier County 34.8%**
- **DC Metro Region 49.5%**
- **State 36.7%**

income & poverty

Per Capita Personal Income



Poverty Level

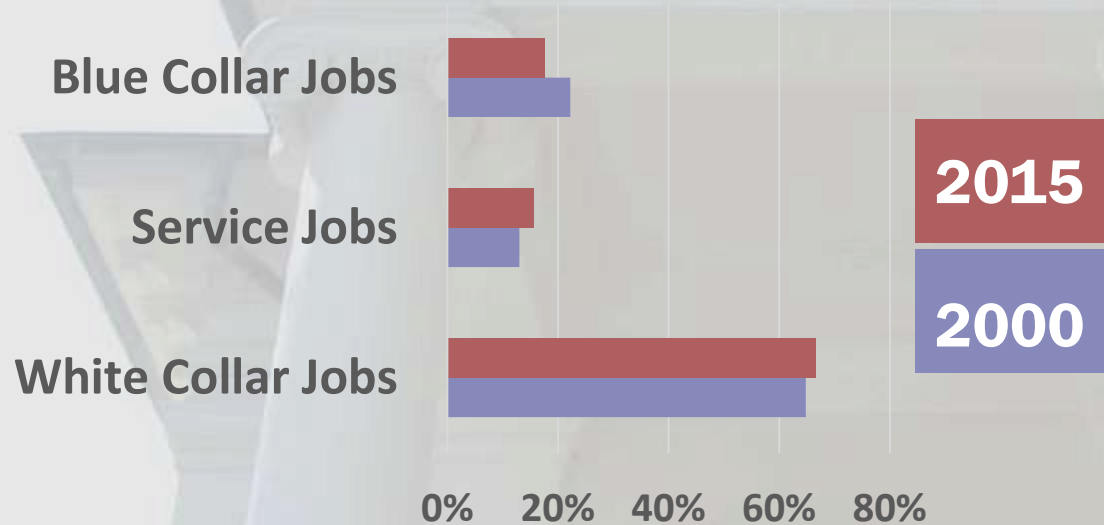
Source: 2000 Census, 2014 American Community Survey, ESRI Business Analyst 2015 estimates, U.S. Bureau of Economic Analysis



employment

- Fauquier County residents primarily work in white collar jobs, similar to the region and the state
- The primary change since 2000 has been a decrease in the share of blue collar workers and an increase in services workers

TYPES OF EMPLOYMENT



Source: 2000 Census, ESRI Business Analyst 2015 estimates

commuting

- County residents spend an average of 5 minutes longer on their commutes than the region average
- The rate of 45+ minute commutes is 12 percentage points higher than the region

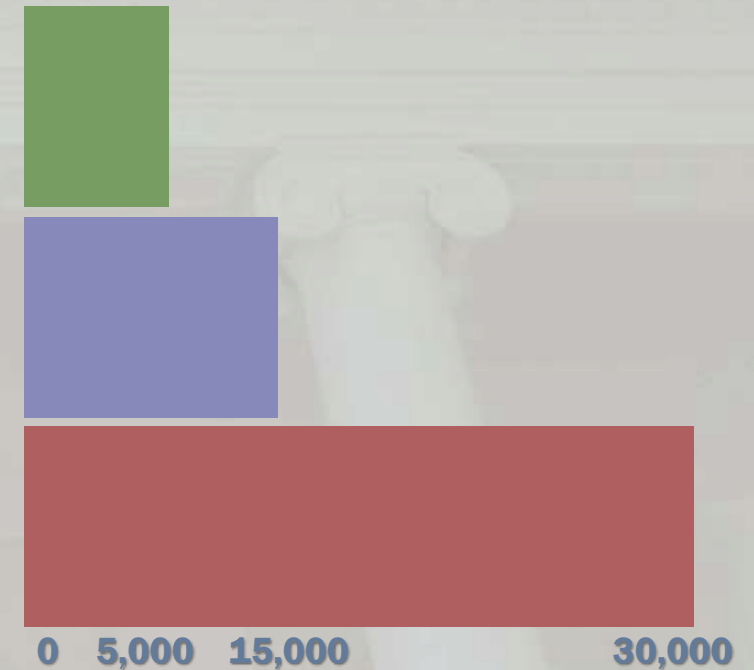
Source: 2000 Census, 2014 American Community Survey, Census-LEHD Program



Live and work in County

In Commuters

Out Commuters



Source: 2000 Census, 2012 American Community Survey, Census-LEHD Program

plus

over the past 15 years,
the County's per capita
GDP (Gross Domestic
Product) has
**increased at
three times** the
annual rate of the
nation's

Source: U.S. Cluster Mapping Project

economy



**Highest GDP per
capita** in Rappahannock/
Rapidan Region

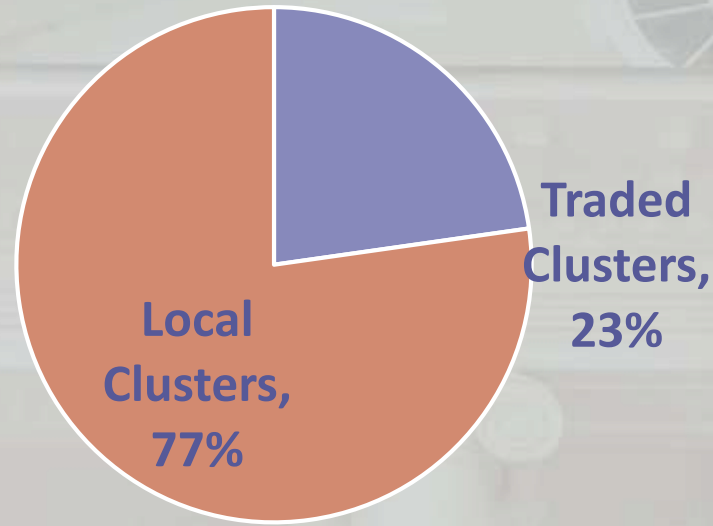
Strong employment
compound growth rate at
2.9% per year (U.S. =
1.2%, Virginia = 1.3%)



minus

economy

**County's average
private sector
annual wage is
below the
national average**



**employment by
cluster type**

**“traded” clusters such
as Financial Services,
Distribution, and Food
Processing pay
significantly lower
average wages in
Fauquier County than
the national average**

farm

economy

54% of county in
ACTIVE FARMLAND
(228,000 acres)

82% FAMILY OWNED!

1,250 FARMS in the
county - 3% increase from
2007-2012

FAUQUIER DAIRY:

#5

in Virginia

Market value of production
increased 12% - 2007-2012
(now \$54 million)

12%

FAUQUIER BEEF:

#8

in Virginia

raise enough cattle annually to feed

525,000 people for a year

ECONOMIC CONTRIBUTION:

- 2,650 jobs
- \$93 million value added
- \$215 million output
- 6.8% of total employment (2012)

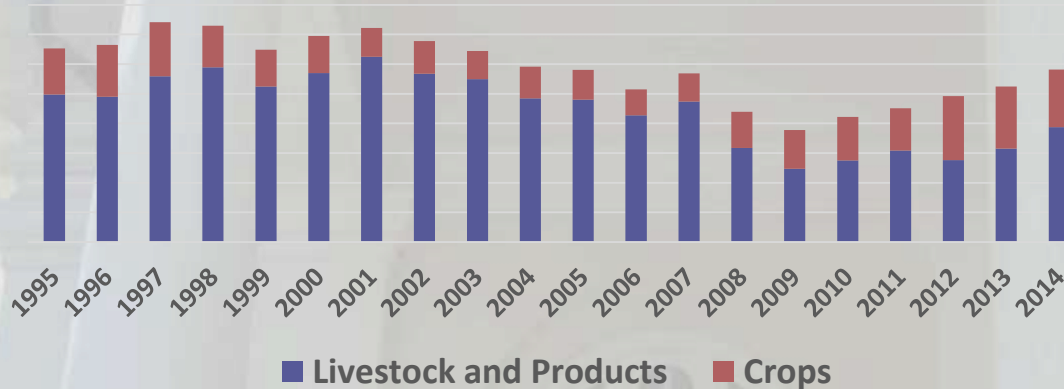
farm

economy

Ranks 3rd
among VA counties
for revenue from
sale of **horses**



Farm Receipts by Source, Adjusted for Inflation



Grape production up
30% in 2015 while
state total was up 8%

Source: U.S. Department of Agriculture. Census of Agriculture

the future?

People age 55+ may go from
30% of the population to **38%**
of the total, with most of the
growth in the **75+ age group**
(in 2035)

older

& wealthier

Households earning over
\$100,000 per year may go from
41% of the total in 2015 to **53%**
of the total in 2035

households potential

Growth in wealthy empty-nester households,
decrease in low/moderate income households



Not much growth in
Millennial
households

employment

County is forecasted to add
19,782 new jobs by 2035 - a
49% increase, but **slower**
than last 20 years

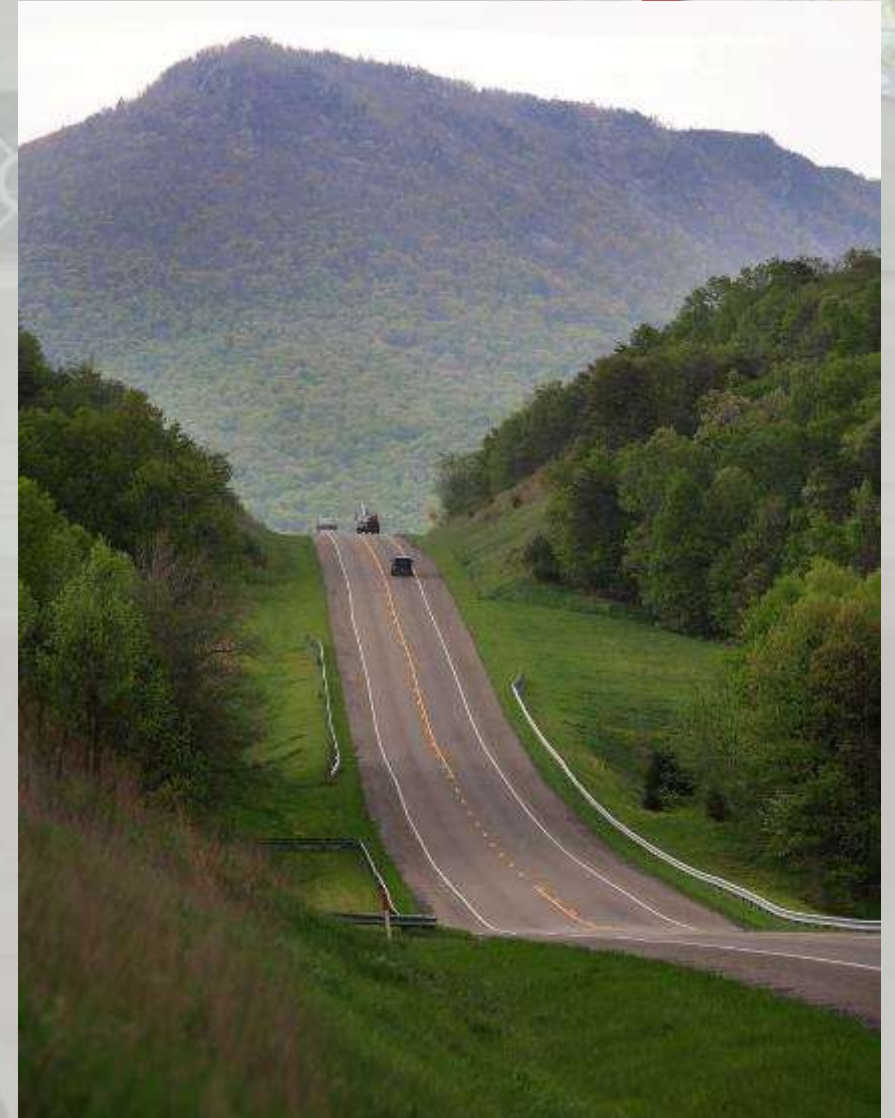
slow

stable

fairly **stable** industry
composition - decrease in **farm**
employment from high of **7%**
in 1995 to projected **3%** in 2035

take aways

- **Steady population growth**
- **Aging population**
- **College degree attainment still trailing**
- **High GDP but low wages**
- **Steady job growth but slower than population**
- **White collar jobs continue to grow**
- **Farm economy strong but changing**



So:
What does it all mean?



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where ~~are we~~ should we be



headed tomorrow?

But first: Survey results

As of May 2016

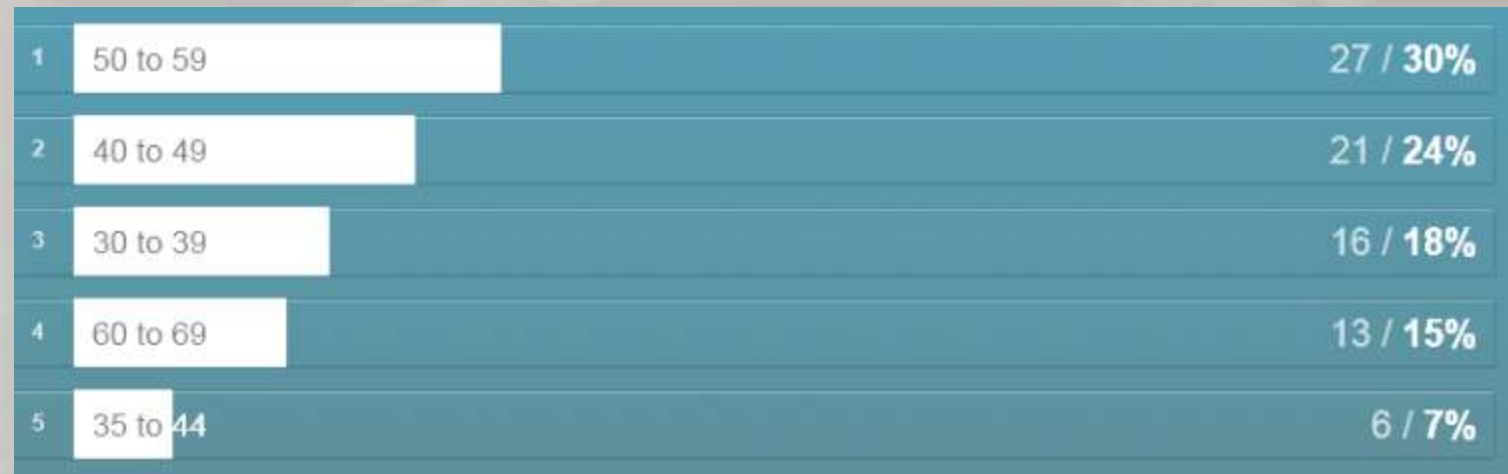


PROJECT WEBSITE: www.fauquiercommunityconversations.org

Where do you live?



How old are you?



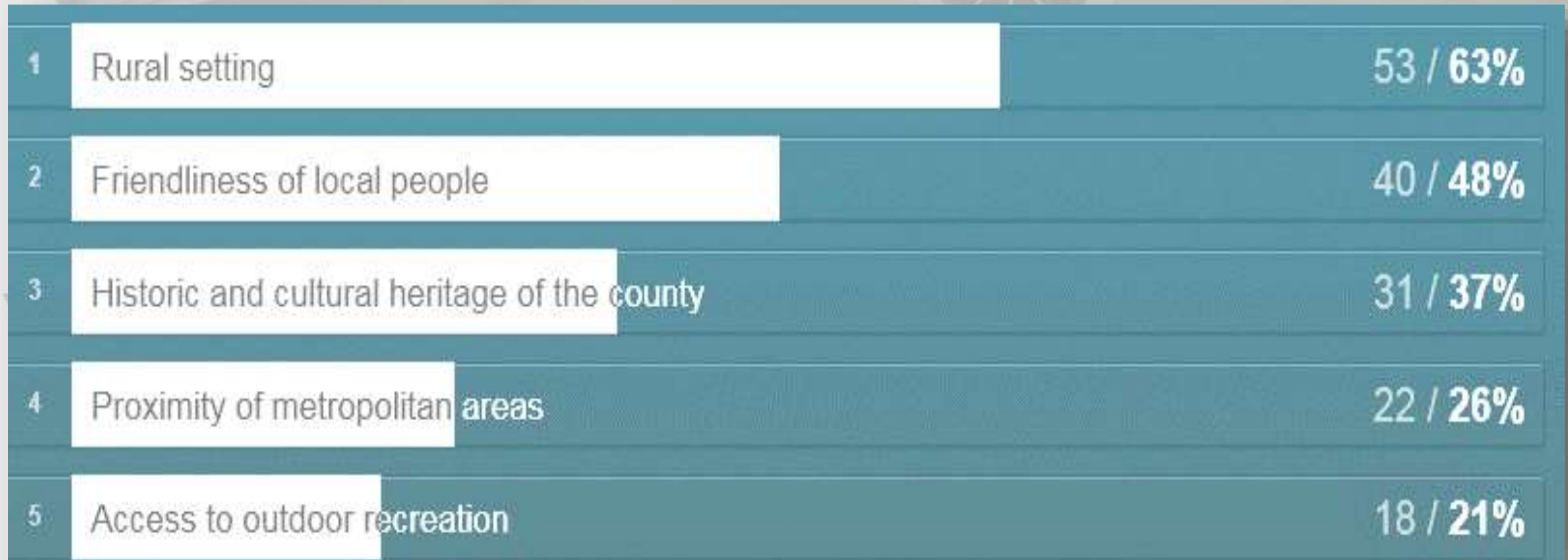
What type of place do you live in today?

1	Rural area but not on a farm	32 / 37%
2	Suburban style neighborhood	24 / 28%
3	On a farm	13 / 15%
4	Town	11 / 13%
5	Do not live in Fauquier County	3 / 3%
6	Village	3 / 3%

What is your ideal place to live?

1	Small town	27 / 35%
2	Rural area but not on a farm	21 / 27%
3	On a farm	17 / 22%
4	Small village	8 / 10%
5	Suburban style neighborhood	4 / 5%
6	City or downtown	1 / 1%

What are your top reasons for living in Fauquier County?



Survey: Qualitative Results*

What places do you treasure most?

- The small towns & downtowns (36)
- Nature and parks (20)
- My neighborhood / My home / My land and property (14)
- Country Roads, Scenic Views & Rural Areas (19)
- Farms & horse farms (10)
- Wineries (5)
- WARF Aquatic Center (4)
- Schools (3)

What improvements / changes see over time?

- Growth in mixed use, shopping and businesses (20)
- Slow growth / Managed growth (13)
- More small business & less sprawl (11)
- Road improvements & traffic calming Rt. 29 (10)
- Rural land preservation (9)
- Better broadband access (7)
- Better services, infrastructure, school funding (9)
- Broaden tax base (5)
- More family oriented & community activities (5)

***Most respondents had multiple responses**

What one word describes what you love about living in Fauquier County?



Size of word indicates frequency of response

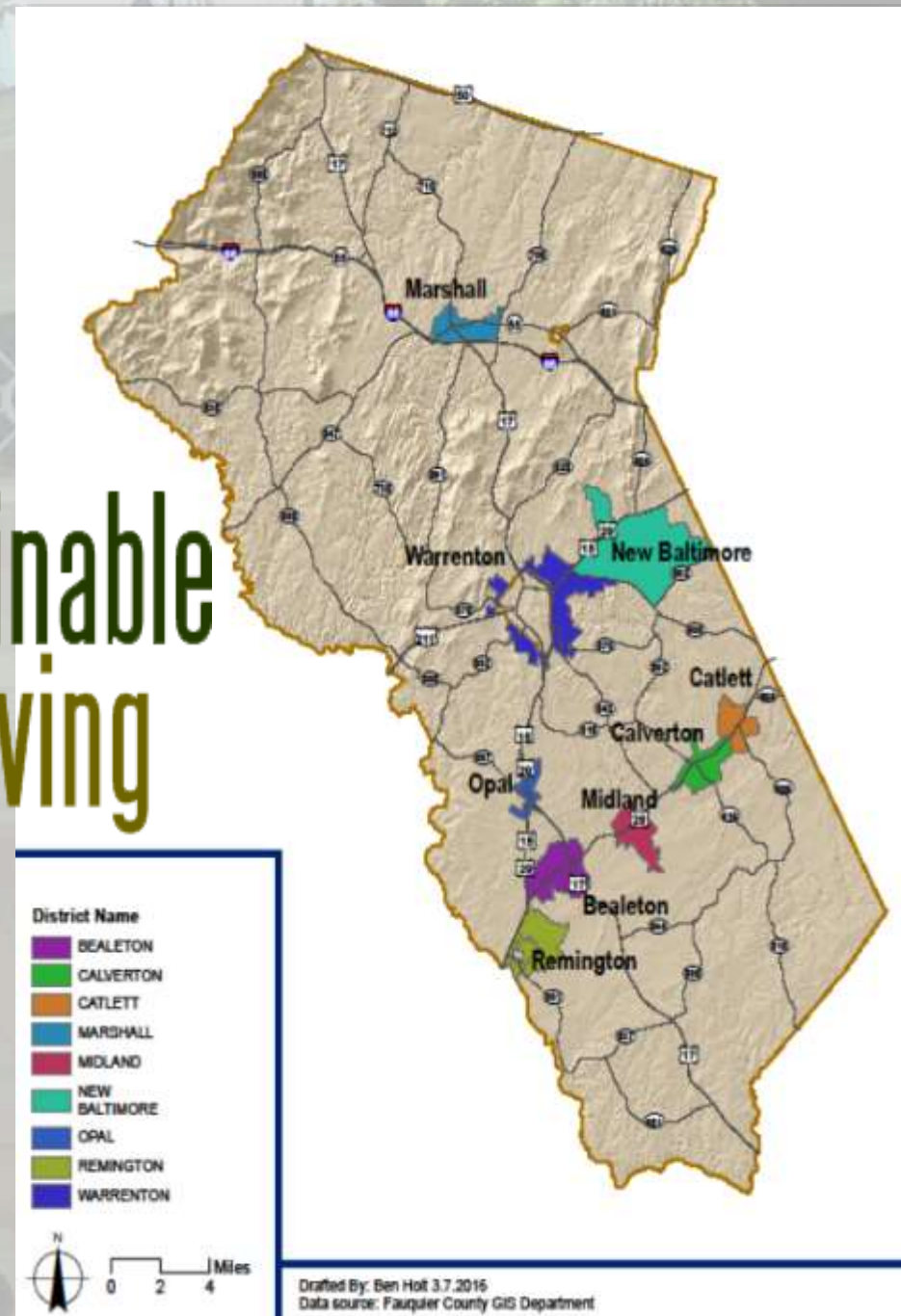
Show us what makes Fauquier a great place to live?



IMAGES POSTED SO FAR

The County's Vision

economy
rural service
districts
agriculture
community
Fauquier
growth resources
sustainable
thriving



your assignment:

After seeing the presentation, write down your thoughts on:

“What kind of future do you want for Fauquier County?”

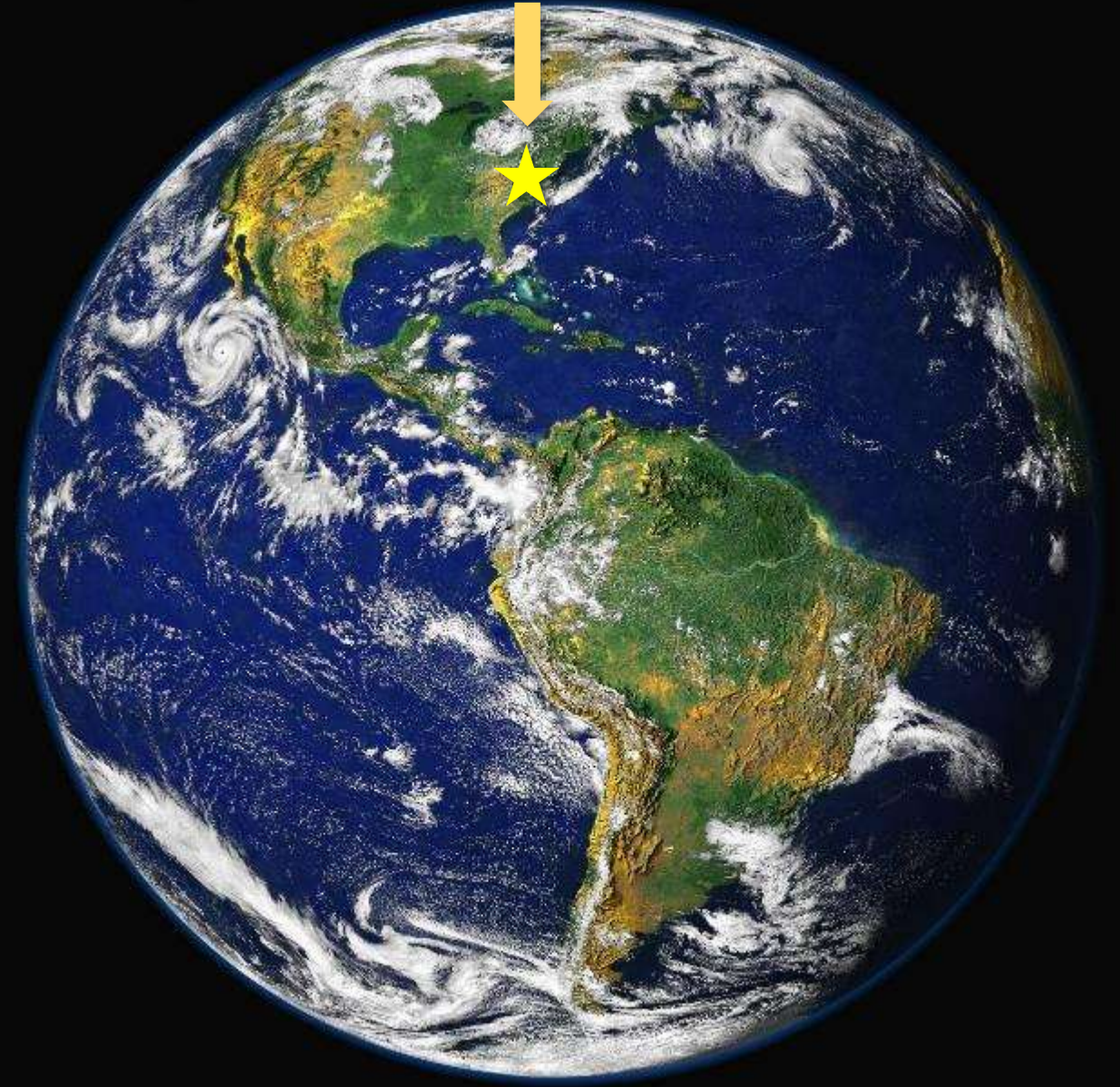
Please be specific about what you would like to see in the future in terms of:

- **Growth**
- **Change**
- **Economy**

Top 10 Game Changers

**Trends that could affect the
way we live, work and play
in the future**

you are here





DEMOGRAPHIC / SOCIAL



TECHNOLOGICAL



ECONOMIC



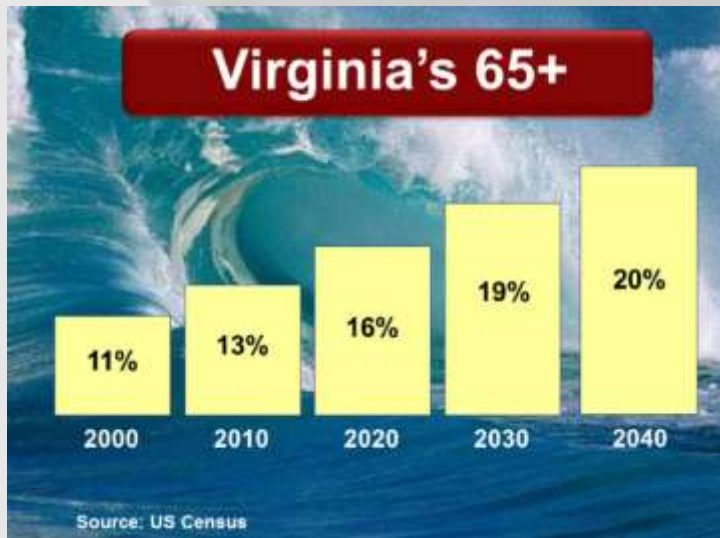
ENVIRONMENTAL

VIRGINIA IN 2040

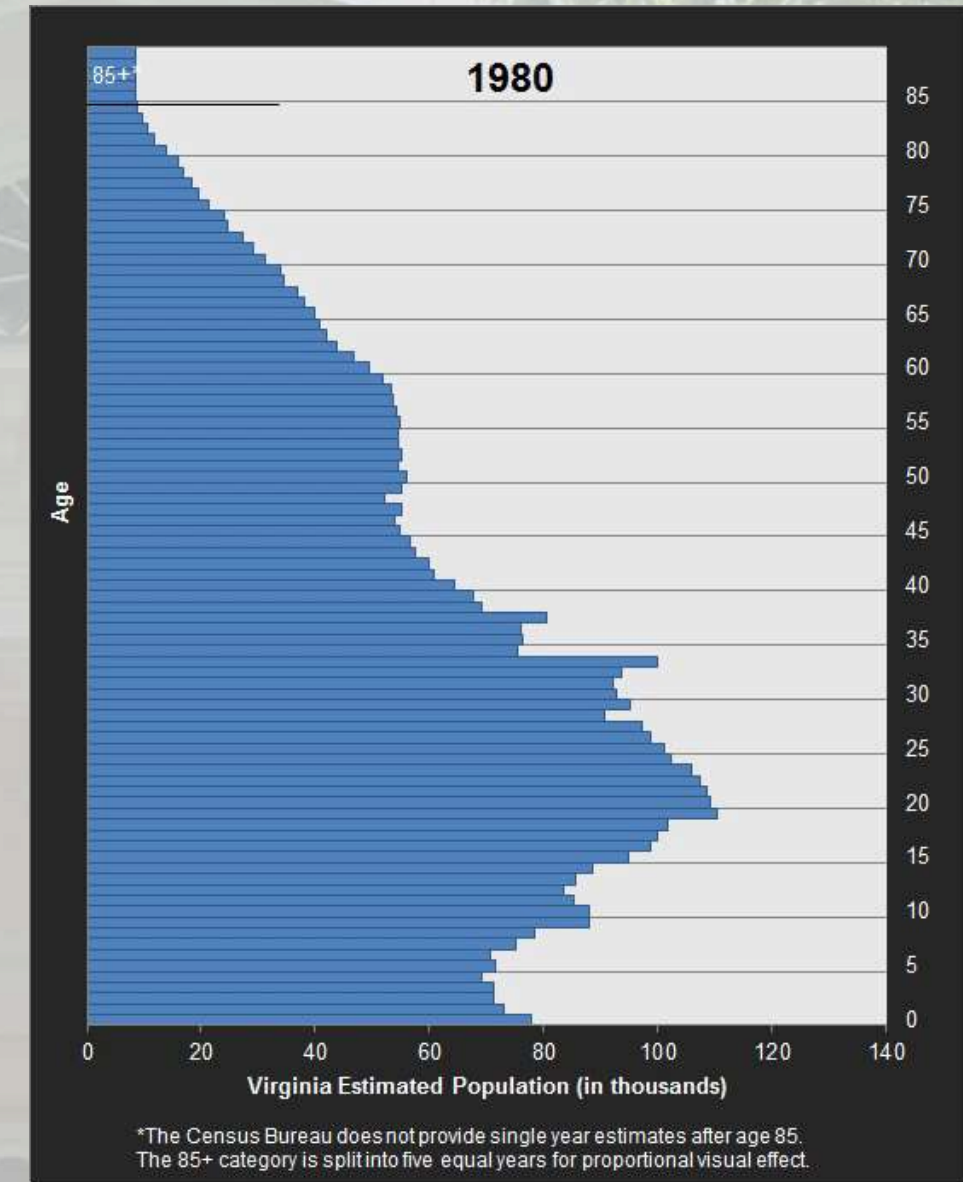
**Trends from research
conducted for
VTrans2040 by
Southeastern Institute
of Research**

1. Age shifts

We are getting older

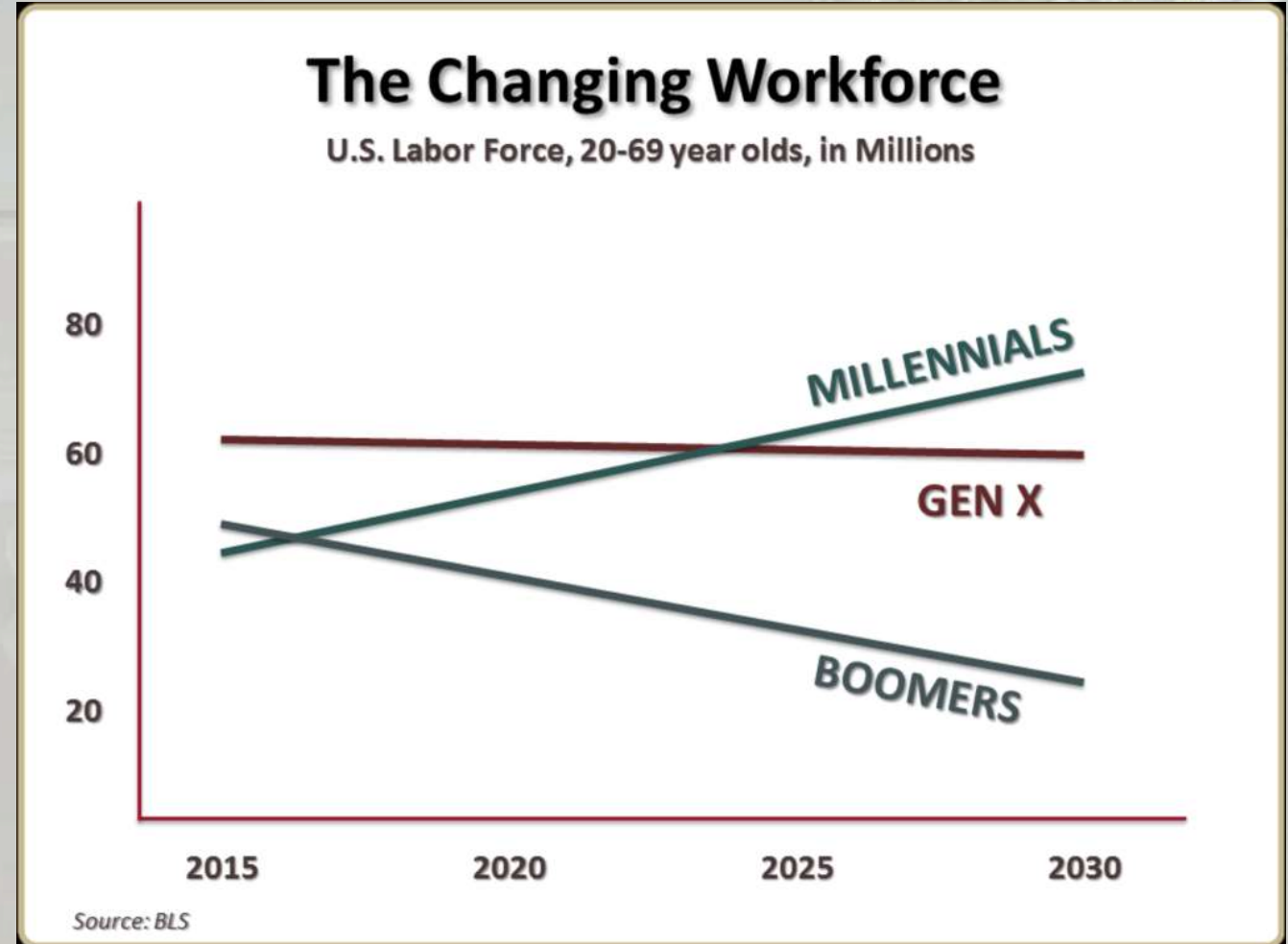


Source: Southeastern Institute of Research for Commonwealth Transportation Board – VTrans2040



Source: University of Virginia Demographics Research Group

2. Millennials



Source: Southeastern Institute of Research for Commonwealth Transportation Board – VTrans2040

3. Decline of conventional suburbs

More people of all age groups want WALKABILITY

Where do you live now and where do you want to live someday if you can afford it?

**A suburb where most people
drive to most places**

	National	Millennials	"Active" Boomers
Now	40%	41%	39%
Someday	7%	8%	7%
Change	-33%	-33%	-32%

Interest is declining

**A suburb with
walkable amenities**

	National	Millennials	"Active" Boomers
Now	18%	19%	14%
Someday	21%	25%	19%
Change	+3%	+6%	+5%

Interest is growing

How this compares with our survey

What type of place do you live in today?

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4. Decline of Auto Dominance?

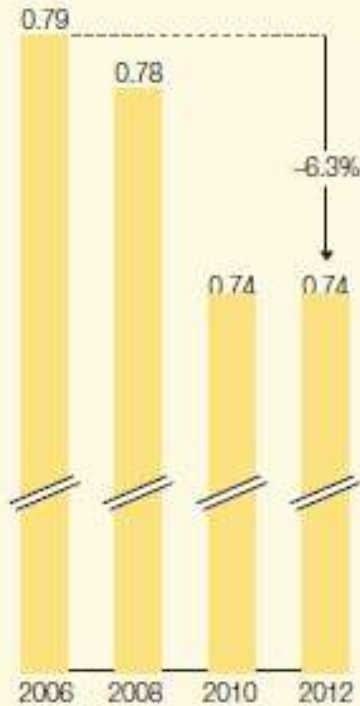
Millennials are 23 percent less interested in owning a car than the generation that precedes them



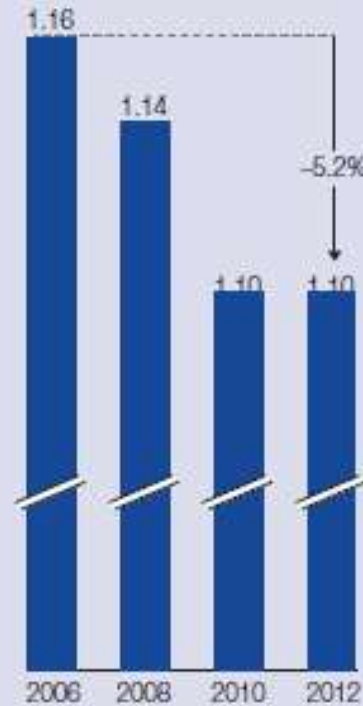
Source: Southeastern Institute of Research for Commonwealth Transportation Board – VTrans2040

In the United States, vehicle ownership rates are declining.

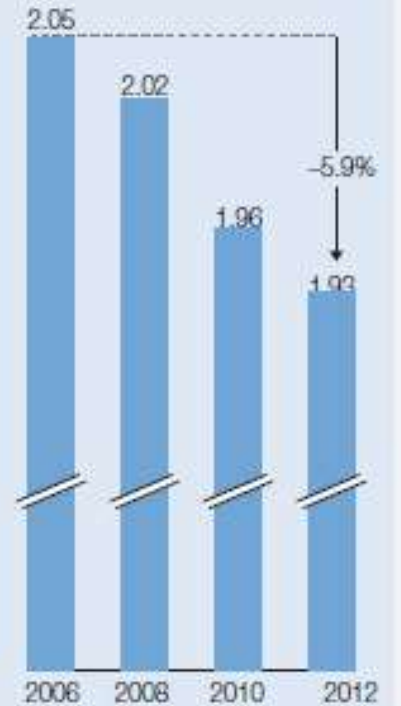
Vehicles per person



Vehicles per driver



Vehicles per household



Source: Michael Sivak, *Has motorization in the U.S. peaked?*, University of Michigan Transportation Institute, Jan 2014; umich.edu

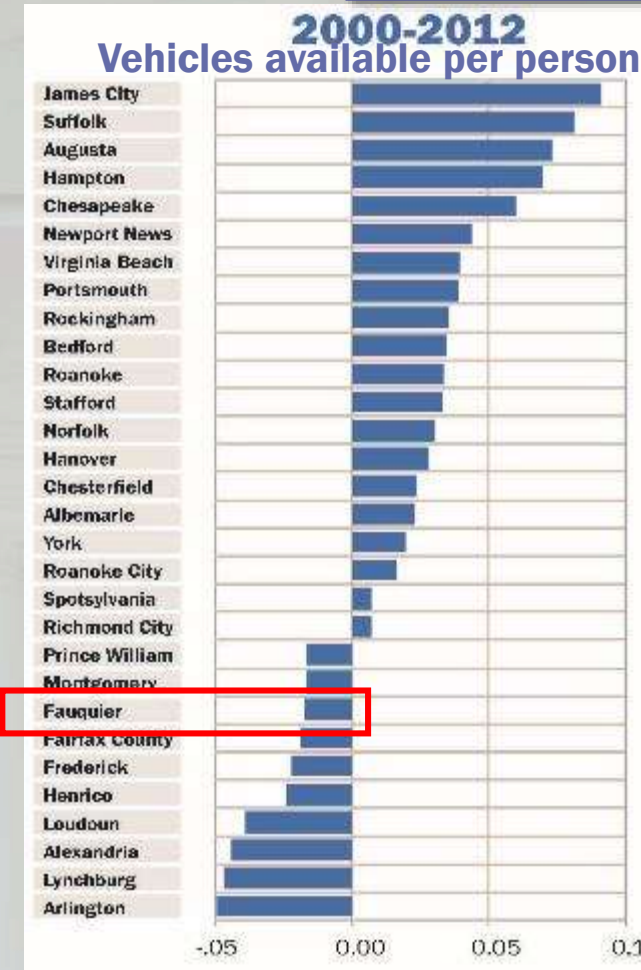
Source: McKinsey, *Urban Mobility at a Tipping Point*, September 2015

4. Decline of Auto Dominance?

More Car Ownership

Trends suggest the potential for greater transit & bike/ped needs in the county

Fauquier County



Source: Change in Vehicles Available Per Person, 1990-2012 Based on Data extracted from (AASHTO, 2003) and U.S. Census Bureau (2013) as summarized for VTrans2040

Less Car Ownership

5. New Technology

New transportation trends:

1. Autonomous vehicles
2. Car Sharing
3. On Demand Mobility



5. New Technology

E Retail = less retail needed

Telecommuting = less offices needed

Distributed workforce = less commuting - more emphasis on “place” & “livability”

“Portable” alternative energy = more dispersed settlement



6. Desire for Alternatives to Cars



Bikers

& Bikers!



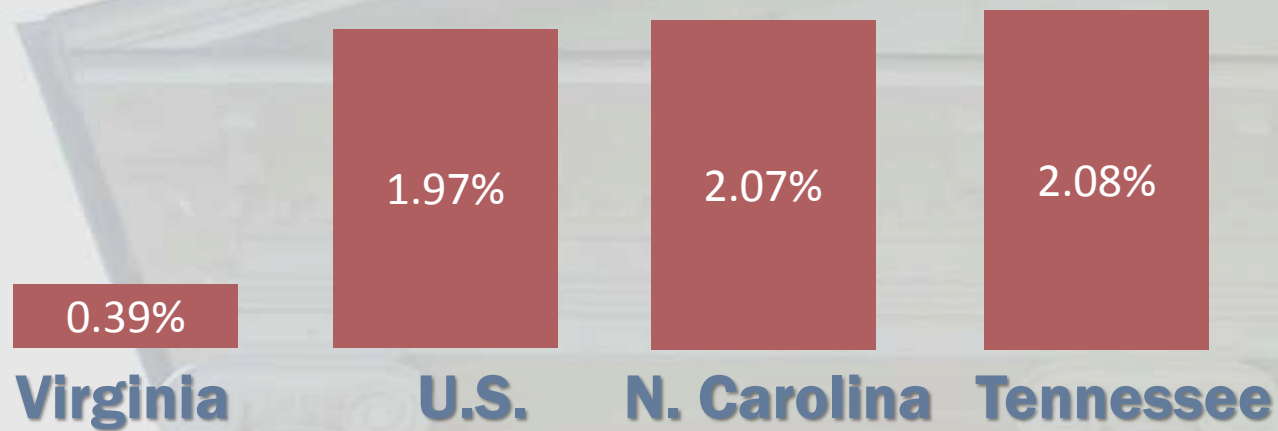
81%
OF MILLENNIALS

77%
ACTIVE BOOMERS

say affordable and convenient transportation alternatives to the car are at least somewhat important when deciding where to live and work.

Majorities of both Millennials **59%** and Active Boomers **58%** said there are not enough transportation alternatives where they live.

7. Economic Challenges & Opportunities



Job Growth in 2014

Declining Job Growth for Virginia

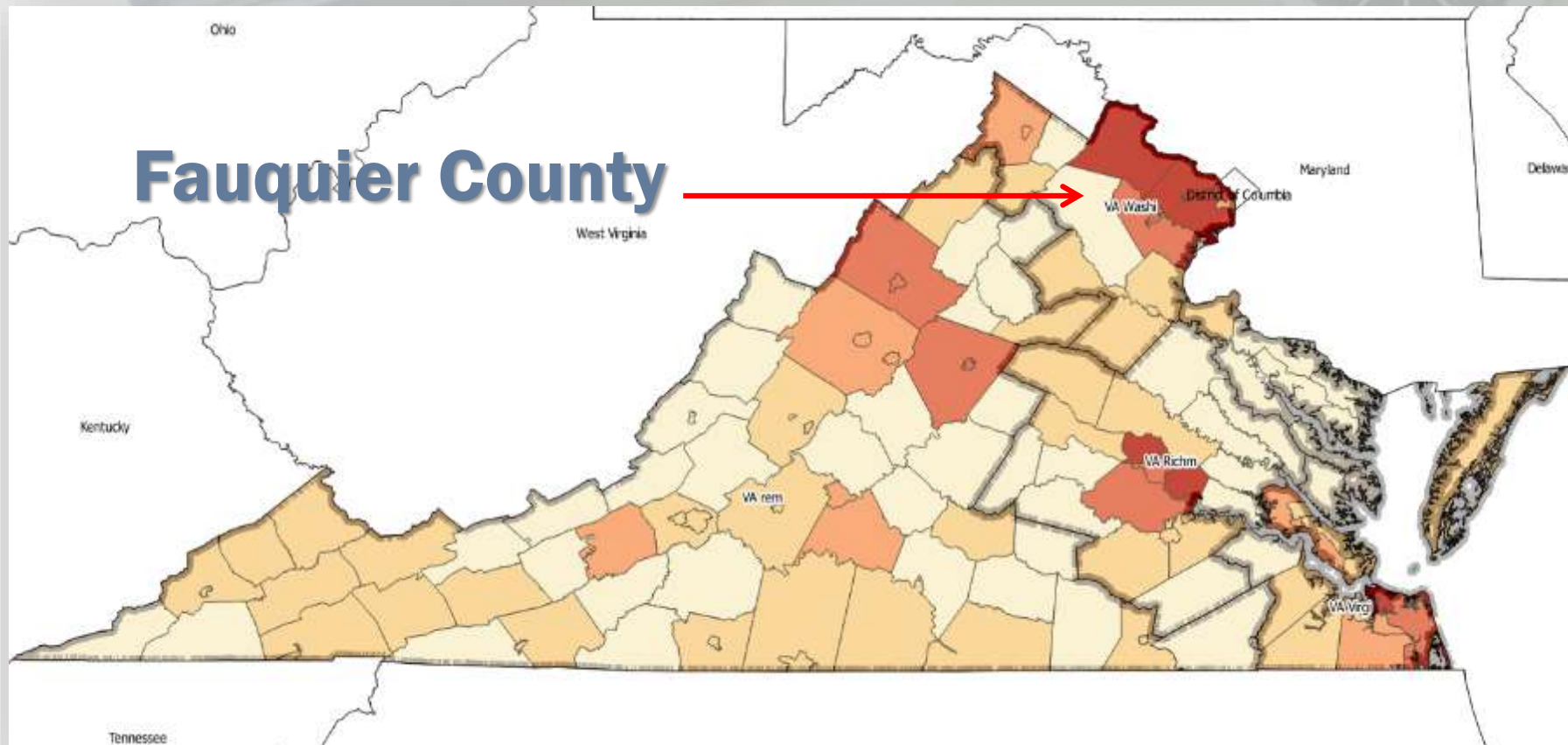
“the trend of Northern Virginia to become the economic engine and population center of Greater Washington occurs regardless of the state of the economy”

Dr. Stephen Fuller

Long term growth in Northern Virginia

7. Economic Challenges & Opportunities

Projected growth in GDP 2012 - 2040



**Fauquier's
economic
growth slower
than similarly
sized counties**

8. Investing in Place

‘The future belongs to those who can effectively create a better “place” for workers today and tomorrow.’

The **Evolving** Economic Development Model

Old Model

Recruit Employers

People Come

Create A Great Place

Community Grows

Evolving Model

Create A Great Place

People Come

Employers Follow

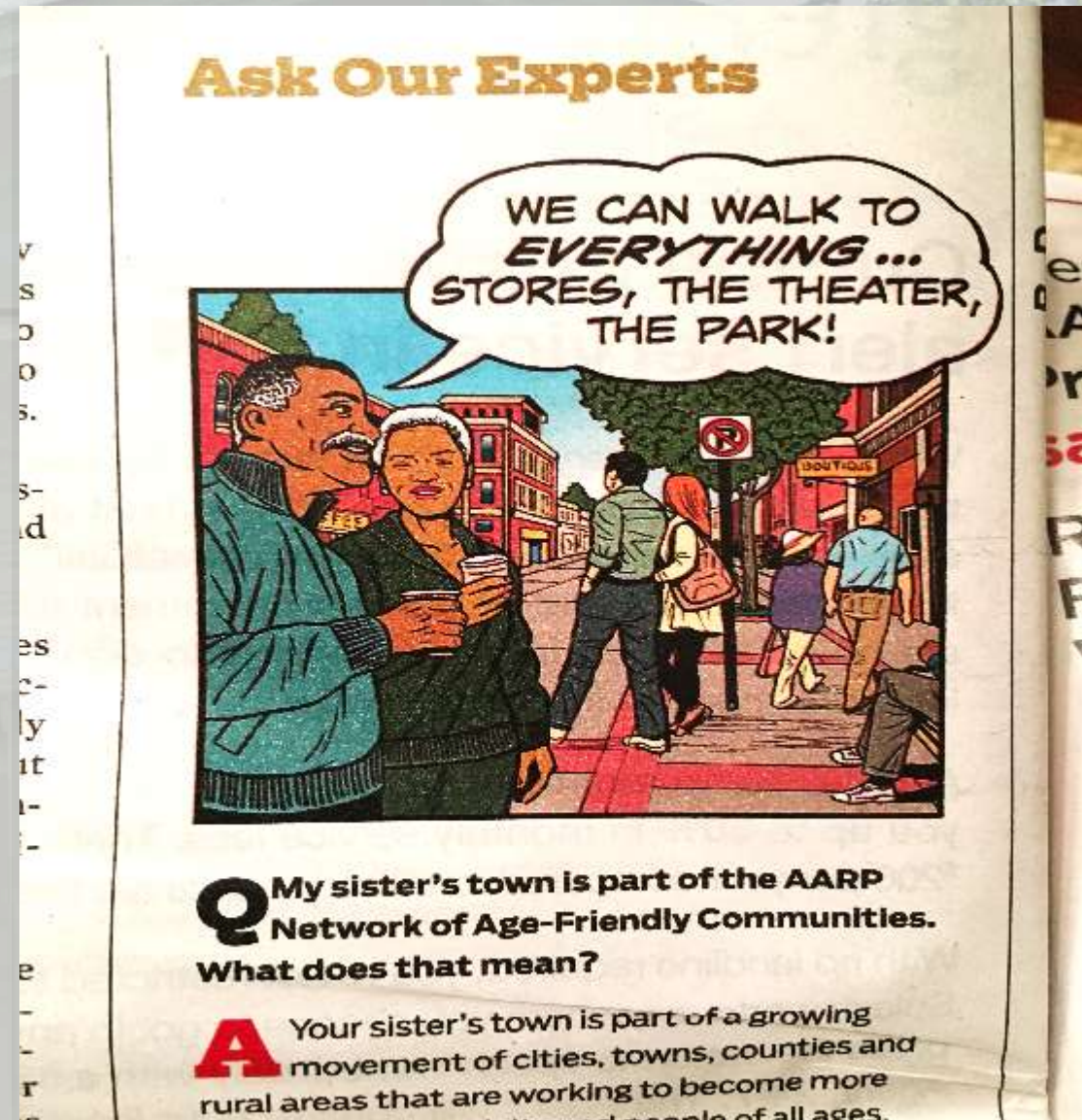
Community Grows



9. The 15 Minute Walkable Community

Nearly half of Americans, and three-fourths of Millennials, say they plan to move in the next five years. What do they want in their new communities?

Walkable, diverse, single family or townhouse homes in a small town.



Source: AARP Magazine

How this compares with our survey

What places do you treasure most?

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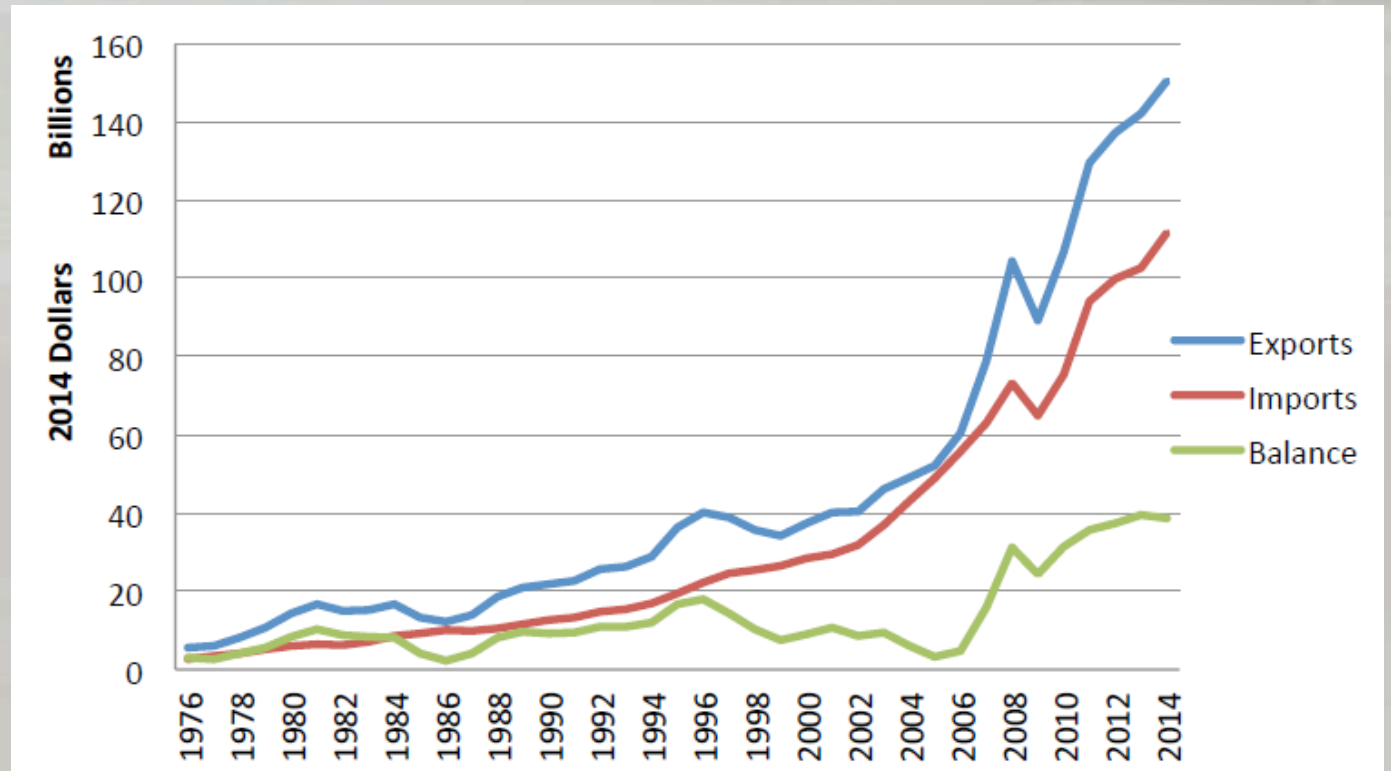
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10. Changing Agricultural Economy

US agriculture continues to “feed the world” but our status is being eroded by gains from China, Brazil and elsewhere

U.S. Agricultural Exports



Source: U.S. Census, International Trade Data

10. Changing Agricultural Economy

Significant growth in both production and consumption of Local Foods

Local/regional food sales in the U.S.

2008
\$4.8 billion

2012
\$6.1 billion



Source: USDA "Trends in U.S. Local and Regional Food Systems: A Report to Congress"

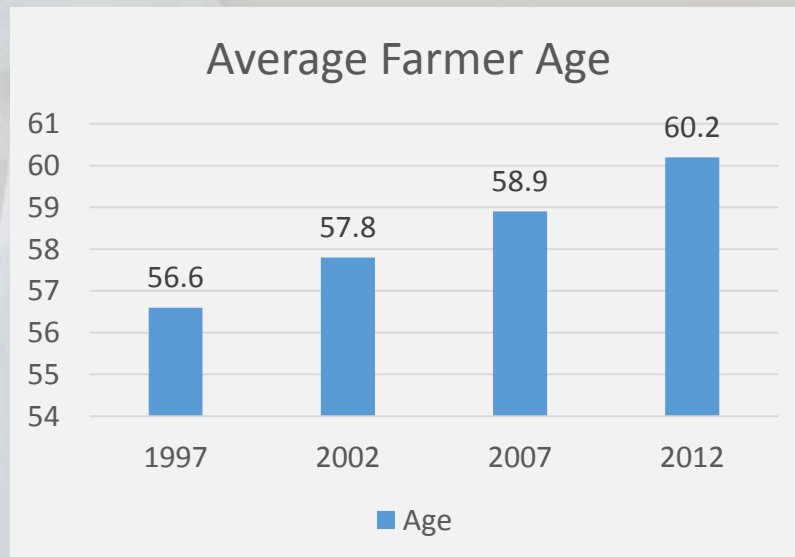
10. Changing Agricultural Economy

“new generation of technology-weaned, innovative younger people is taking over the family farm”



During the recession, solar photovoltaics, wind power, and biofuels grew at a rate of **53%**

Source: Jim Carroll, 10 Big Trends for Agriculture



Source: USDA Ag Census



Source: Southeastgreen.com

11. Changing World!

Urbanization?

Water Wars?

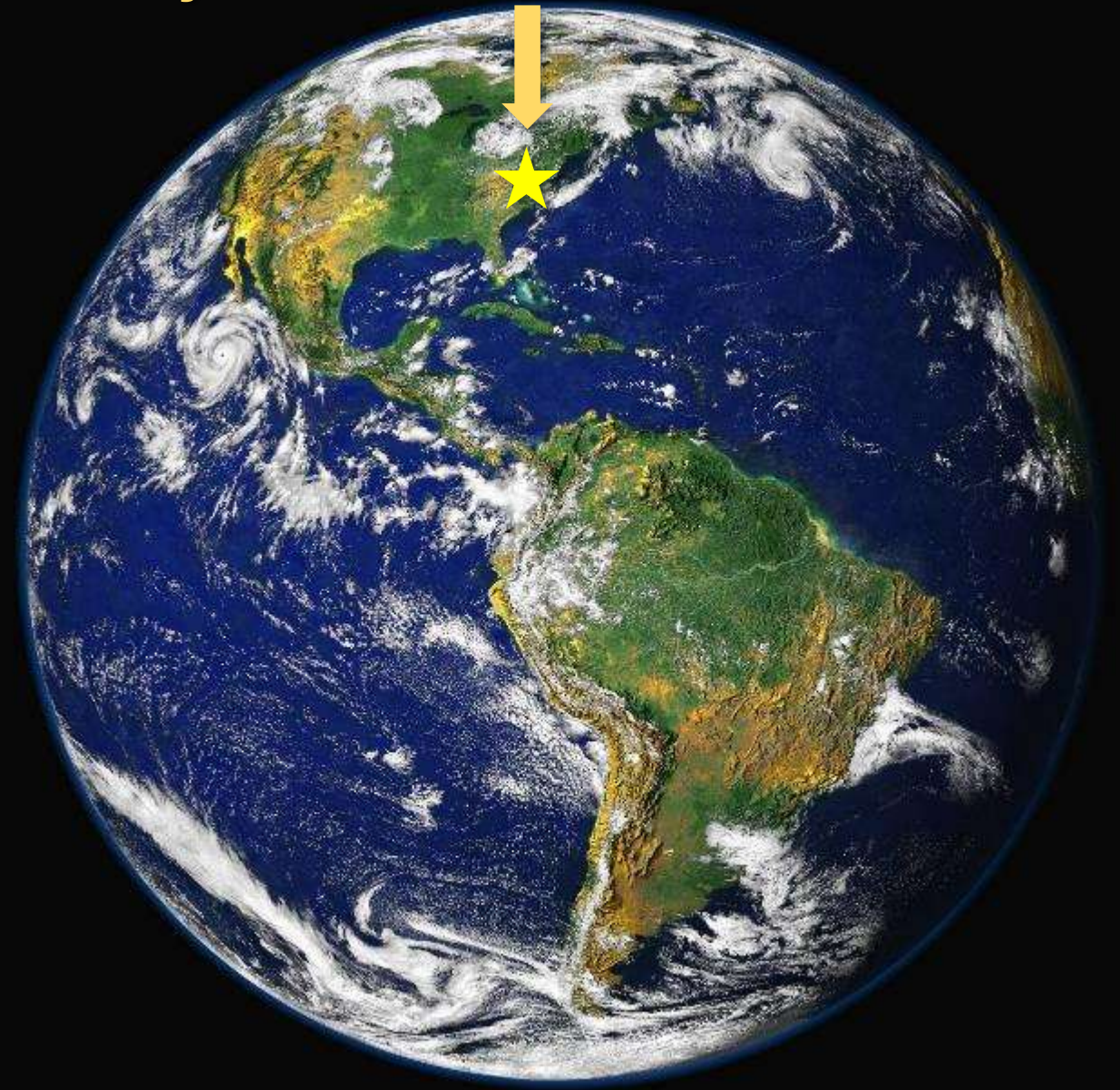
Alternative Energy?

Changing Climate?

Technological Breakthroughs?

Your most important trend?

you are here



So:
What does it all mean?



Fauquierbusiness.com



where ~~are we~~ should we be



headed tomorrow?

your assignment:

After seeing the presentation, write down your thoughts on:

“Which forces or trends do you think will most shape the county’s future?” Please be specific about how and why these forces may affect our future.

Recap

- 1. Aging Virginia**
- 2. Millennial Growth**
- 3. Decline of Conventional Suburb**
- 4. Decline of Auto Dominance**
- 5. New Technology**
- 6. Desire for Car Alternatives**
- 7. Economic Challenges/Opportunities**
- 8. Investing in Place**
- 9. The 15 Minute Walkable Community**
- 10. Changing Agricultural Economy**

